

2023 Researcher Forum

Agenda

Tuesday, December 5

8:30am - 9:00am **Registration, Arrival Tea & Coffee**

9:00am - 9:05am **Introduction**

Introduction



CHAIR

Aleks Vickovich

Editor-in-chief,
Conexus Financial

9:05am - 9:45am **Accepted truths that might be lies**

Investors make common mistakes, especially in long market cycles, when trend is mistaken for market truth. We examine what investors today accept as truth and the cognitive biases that contribute to those views, concluding with opportunities that exist for savvy investors willing to take the other side of the bet.



CHAIR

Julia Newbould

Managing editor,
Conexus Financial

9:45am - 10:30am **Thematic investments - if we're nearing the end of a cycle how can we know what the new theme is that we should be investigating**

Where do new ideas emanate from, and how do fund managers determine the right time to launch a new thematic product?



James Maydew
Head of global listed
real estate,
Macquarie Group



Paul Saliba
Head of fixed
income and equities,
SQM Research



Jonathan Tolub
Director,
InvestSense



Simon Hoyle
Group publisher,
Conexus Financial

CHAIR

10:30am - 11:00am **Morning Tea**

11:00am - 11:45am **High yield/Private investigations - new opportunities in equity and credit**

Advisers with high net worth clients are looking for edgier products. How are researchers ensuring they are on top of them all?



Angela Ashton
Director and
founder, Evergreen
Consultants and
Evergreen Ratings



Brett Craig
Director of private
credit, Aura Group



Norman Zhang
Incoming chief
investment officer,
KODA Capital



Chris Dastoor
Editor, Professional
Planner

CHAIR

11:45am - 12:15pm **Making the most of fixed income in the current market**

Looking at ways to maximise fixed income opportunities in a portfolio.



Joran Laird
Fixed income
portfolio specialist,
T. Rowe Price



Julia Newbould
Managing editor,
Conexus Financial

CHAIR

12:15pm - 1:15pm

Portfolio construction - is 60/40 back. With bond yields at 4%-5% and unlisted not doing their job does this bring us back to the future

Looking at the role of unlisted assets and the role of alternatives in dynamic asset allocation. There is pressure to invest more in illiquids - what should the allocation be?



Rob da Silva
Principal, Da Silva
Consulting



Kristina Hermanson
Head of APAC and
Africa, MD, Nuveen
Natural Capital



Dominic McCormick
Consultant, DPM
Financial Services



CHAIR

Simon Hoyle
Group publisher,
Conexus Financial

1:15pm - 2:15pm

Lunch

2:15pm - 2:55pm

Liquidity and valuations - protecting investor equity in products with exposure to unlisted markets

How important are valuations to advisers and their clients, and how do researchers navigate funds that operate with markedly different valuation models?



Annika Bradley
Director, manager
research ratings,
Morningstar



Andrew Fisher
Head of iportfolio
strategy, Australian
Retirement Trust



Brad Matthews
Founding director,
Brad Matthews
Investment
Strategies



CHAIR

Aleks Vickovich
Editor-in-chief,
Conexus Financial

2:55pm - 3:40pm

Retirement income covenant: Challenges for researching a new generation of retirement products

A range of products have been launched in the retirement space, from annuities to allocated pensions and other variations - how can researchers help advisers and their clients navigate the nuances between them and help them structure their retirement

using one or more of these products?



Jayson Dominelli
Senior product manager, retirement product, Aware Super



Melody Edwards
Financial adviser, Evaluesco



Ian Fryer
General manager, Chant West



Justine Marquet
Head of technical services, Allianz Retire+



Julia Newbould
Managing editor, Conexus Financial

CHAIR

3:40pm - 4:00pm

Afternoon Tea

4:00pm - 4:35pm

SMA's - building portfolios inhouse or going external - the great debate

There are pros and cons for SMA's being created in-house versus being brought into advice businesses from external managers. We look at the advantages of each for advice businesses and also for their clients.



Mark Minchin
Managing partner, Minchin Moore Private Wealth



Brook Sweeney
Senior portfolio manager, Lonsec



Chris Dastoor
Editor, Professional Planner

CHAIR

4:35pm - 5:30pm

The sustainability of the research industry - conflicts, regulation, pricing, and staffing

The research industry has challenges in recruitment and retention, pricing models can seem conflicted and there is the ongoing conflicted model with SMA's. The regulator has up to now kept its focus off research but that may change. Can research continue to operate the same models in the same way into the future?



Bronwen Moncrieff
General manager and head of research, Zenith



Tim Murphy
Director, head of research, Insight Investment Consultants



Lorraine Robinson
Executive director, Lonsec Research



Jack Standing

Group head of
advice, managing
director, WT
Financial Group



Aleks Vickovich

Editor-in-chief,
Conexus Financial

CHAIR

5:30pm - 6:30pm

Drinks and Networking